REQUEST FOR PROPOSAL
Addendum # 1

DATE ISSUED: July 22, 2003

RFP Title:	**PeopleSoft Human Resources/Payroll Application Upgrade**
Requesting Dept./ Div.:	**King County Department of Executive Services / Finance & Business Operations Division**
RFP Number:	**137-05RLD**
Due Date:	**August 4, 2005 - 2:00 P.M.**
Buyer:	Roy L. Dodman, *roy.dodman@metrokc.gov* (206) 263-4266

This addendum is issued to revise the original Request for Proposal, dated June 30, 2005 as follows:

1.   The proposal opening date remains the same: Thursday, August 4, 2005 no later than 2:00 p.m. exactly.

2.   The sign in sheet from the July 14, 2005 pre-proposal conference is available by contacting Cathy Betts at *cathy.betts@metrokc.gov*. Please include your FAX number if you wish to receive a faxed copy.

TO BE ELIGIBLE FOR AWARD OF A CONTRACT, THIS ADDEMDUM MUST BE SIGNED AND SUBMITTED TO KING COUNTY

Sealed proposals will only be received by:
King County Procurement Services Section, Exchange Building, 8th floor, 821 Second Avenue, Seattle, WA 98104-1598. Office hours: 8:00 a.m. - 5:00 p.m., Monday – Friday

Company Name

Address	City / State / Postal Code
Signature	Authorized Representative/Title
Email	Phone	Fax

Prime Proposer SEDB Certification number (if applicable - see Section II, 3.1.A below in this Addendum 1)

This Request for Proposal – Addendum will be provided in alternative formats such as Braille, large print, audiocassette or computer disk for individuals with disabilities upon request.

The following changes are made to the RFP:

3.   Add New Section to RFP document - Section II, 3.1.A

3.1.A. **King County Contracting Opportunities Program**

The purpose of the King County Contracting Opportunities Program is to maximize the participation of Small Economically Disadvantaged Businesses (SEDB) through the use of rating points in the award of King County competitively bid contracts for the acquisition of technical services. The program is open to all firms that are certified as an SEDB by King County's Business Development and Contract Compliance Office.

A "Small Economically Disadvantaged Business" (SEDB) means that a business and the person or persons who own and control it are in a financial condition, which puts the business at a substantial disadvantage in attempting to compete for public contracts. The relevant financial condition for eligibility under the Program is set at fifty percent (50%) of the Federal Small Business Administration (SBA) small business size standards using the North American Industrial Classification System (NAICS), and an Owners' Personal Net Worth less than $750K dollars.

A "Certified Firm" means a business that has applied for participation in King County's Contracting Opportunities Program, and has been certified as an SEDB by the King County Business Development and Contract Compliance (BDCC) office. Information about becoming a Certified Firm, as well as a list of Certified Firms, may be obtained by visiting the King County's Contracting Opportunities Program Website address:
http://www.metrokc.gov/exec/bred/bdcc/prog/kccontractopp.htm or contacting the BDCC office at (206) 205-0711.

In the evaluation of proposals, ten points will be allotted for SEDB participation. King County will count only the participation of SEDBs that are certified by King County at the date and time of proposal submittal. After tabulation of the selection criteria points of all prime submitters, ten (10) points shall be added to the score of all proposals that meet at least one of the two following sub-criterion:

1. If the Prime submitter is a SEDB firm that anticipates performing work for the entire contract unassisted and includes the SEDB certification number on page one of this submittal.

2. If the Prime submitter is not an SEDB but will use SEDBs for at least 5% of the total contract labor hours in the work to be performed in this contract, and who complete the following table and include it in their proposal submission:

SEDB Certification Number	Sub-Consultant Name	Contact Name / Phone	Work to be performed	Percentage of Total Hours

SEDB participation shall be counted only for SEDBs performing a commercially useful function according to custom and practice in the industry. A commercially useful function is defined as a specific scope of work for which the SEDB has the management and technical expertise to perform using its own workforce and resources.

4.   Delete Section II, 2.2, Item 3 in its entirety and replace with the following:

    3.   New Features in existing modules -

        ***3A.   New Features in existing modules** - Provide expert functional and technical resources to recommend how the County should implement the new and different features provided in PeopleSoft 8.9 if it makes sense to do so to solve current business and technical problems. The County expects the Consultant to provide extensive leadership and experience in this important area.*

        ***3B.   New Modules and new features** - The County is currently reviewing opportunities to implement new business processes and related PeopleSoft technology to support Human Resource functionality such as: Position Management, Core Competencies, Performance Management and Succession Planning. The County wants the consultants to propose ways to review and understand the related PeopleSoft functionality in order to begin to work the business process issues, without directly impacting the PeopleSoft upgrade project. For this task, the County will provide human resource functional specialists who are not significantly involved with the upgrade.*

5.   Make the following changes to Section II, 4.1, Mandatory Experience, 1st bullet:

Delete:

- Experience successfully upgrading from PeopleSoft HRMS version 8 SP1 to HCM 8.8 or above on a minimum of (one) 1 project. To qualify, Projects must have been completed or substantially completed in the opinion of the County.

Replace with:

- Experience successfully upgrading from PeopleSoft HRMS version 8.0 to HCM 8.8 or above on a minimum of (one) 1 project. To qualify, Projects must have been completed or substantially completed in the opinion of the County.

6.   Make the following changes to Section II, 1.2, King County installation Outline:

Delete:

    <u>Interfaces:</u>

- Inbound Count - 11
- Outbound Count - 33

Replace with:

    <u>Interfaces:</u>

- Inbound Count - 12
- Outbound Count - 29

The following information is provided in response to questions received:

Q1:   Will the public opening be at 2:00 on August 4?

A1:   Yes, unless changed by the County via an addendum. The only information that will be given out at the time will be the names of the companies submitting proposals. This information will be posted to the King County PCSS website by the next morning also.

Q2:   Section I: *Item I: " …a contract with a fixed price/prices will be negotiated. AND Section II item 5.9 Financial Proposal, indicates a time and material bid is acceptable."* Does this mean that even though we may provide a time and materials bid, the contract will be negotiated as a fixed price? If

this is the case, will the County consider paying for an assessment which will allow us to determine a fixed bid amount?

A2:   *The County expects to execute a fixed-price deliverables-based contract. The consultant proposal should include these elements. No, the County will not consider paying for an assessment.*

Q3:   Regarding 2.1 Project Team: What is the breakdown of the Payroll Systems Support and Development Team by number of Functional Analysts, Technical Analysts, Management, and other?

A3:   *Please refer to RFP Section 2.1 for this breakdown.*

Q4:   *1.2 King County Installation Outline:* Please provide more information regarding interfaces to third party applications. Were the King County Sub Systems developed using PeopleTools created prior to the upgrade in 2003? In other words, have those applications been upgraded before?

A4:   *The MSA Payroll printing interface was developed in PeopleTools 8.18. The Uniform Allowance was developed in version 7 and was upgraded previously to version 8.18. The current WA State Retirement system was developed and existed in a separate database that was PeopleTools 8.14. The system was eventually migrated to our main production database which is PeopleTools 8.18.*

Q5:   Have any customizations been made to the delivered COBOL? If yes, please describe.

A5:   *There are only a few very minor changes to the delivered COBOL. One program has had array sizes adjusted. Five others have had store statement modifications to improve SQL performance.*

Q6:   Regarding 1.2 King County Installation Outline: Where is workflow being utilized? (Installation)

A6:   *The ePay application uses workflow to send W2 re-issue requests to a payroll administrator worklist.*

Q7:   Will the infrastructure evaluation be completed prior to the beginning of the upgrade efforts? What are the expectations of the consultant relating to the technical infrastructure?

A7:   *Yes, the infrastructure analysis will happen before the upgrade efforts. We want the consultant to review and comment and accept the infrastructure assessments.*

Q8:   *2.2 Scope of Work (overview): Proposer shall include a proposed division of labor between Consultant and the County: Are you asking to identify a breakdown of task responsibilities between the Consultant and the County or are you expecting an estimate of the number of hours the County staff will need to devote to specific tasks?*

A8:   *The County expects a breakdown of the major tasks by the County and the consultant; and the estimated hours for each.*

Q9:   *2.2 Scope of Work section 16 Co-Location:* The consultant team must be co-located with the existing support staff. And also section 8 Technical Upgrade Tasks: Will the county consider any of the technical steps which are assigned to the Consultant be performed in an off-site lab environment? If so, will you require that the lab includes assurances that all lab activity is completely open and accessible to the County?

A9:   *No. The county expects that the majority of the work will be done on-site. A major objective for this project is knowledge transfer, which requires on-site partnership between the County and the consultants. The County understands that there might be some opportunity or benefit for off site work, but expects that it would be at a minimal level.*

Q10:   *2.2 Scope of Work section 13 Oracle:* Will the Consultant be responsible for the upgrade of the Oracle database or just assist and advise the County with performing this activity?

A10:   *The consultant will be responsible for the Oracle upgrade activities. The County will participate and assist. This is a good example of a knowledge transfer opportunity.*

Q11:   *2.2 Scope of Work (overview):* Will the Consultant assist in the roll out of the system to the rest of the county?

A11:   *That is a subsequent phase. The upgrade contract will be over.*

Q12:   *3.2 Schedule:* Is the estimated go live date of 9/2/06 just an estimate or is that date significant or related to other projects or activities?

A12:   *This is an estimate and desirable. But, it is also before the year-end activities start, which is strongly preferred.*

Q13:   *4.0 Consultant Qualification (overview): The County requires that the Consultants presented during the Consultant evaluation process be available to the County at the time of its project launch:* Proposals are due August 4 and the project kickoff is estimated to be November 1, so what amount of flexibility will the County give the Consultant in this qualification when we are estimating resource availability 3 months into the future?

A13:   *The County expects the team proposed by the consultant will be the team performing the work. If substitutions are necessary, the County reserves the right of approval.*

Q14:   *Mandatory Experience Requirement:* Experience successfully upgrading PeopleSoft HRMS 8.0 SP1 to HCM 8.8 or above. To qualify, Projects must be completed or substantially completed in the opinion of the County. *QUESTION:*   Will the County consider rewriting this requirement to be more realistic to the PeopleSoft public sector upgrade market? For example, not limiting the project experience to specific version to version upgrades, but perhaps requiring specific applicable version experience (HCM 8.8/8.9) or upgrade experience (any upgrade to an HCM 8.x release). *JUSTIFICATION:* This mandatory requirement is extremely limiting. The known number of public sector HRMS customers that implemented or upgraded to version 8.0 SP1 is few. The majority of the education and government customer base, known to our firm, has implemented or upgraded to version 8.3 or waited until the release of 8.8 to upgrade. Of the few 8.0 SP1 customers known, most are only recently pursuing their upgrade projects to 8.9, perhaps because of the uncertainty that existed because of the Oracle acquisition.   Since the County will not consider <u>any</u> proposer who does not meet the mandatory requirements, we believe this particular requirement will ensure that the responses will be few to none.   Our firm, for example, has recently begun an upgrade that meets this specific requirement, but it is not substantially completed.   Our firm has successfully completed several 7.x to 8.x upgrades and numerous 8.8 implementations and has several 8.9 projects underway.

A14:   *No. The mandatory experience stated in 4.1 of the RFP is the minimum.*

Q15:   Regarding Questionnaire Item 2.   Is the County limiting the request for the Consultant's current United States client list to those associated with the division of the firm/company responding to the RFP?

A15:   *Yes. The County is only interested in a client reference list that includes PeopleSoft upgrades performed in the United States by the proposing team.*

Q16:   *Evaluation Criteria.*   Evaluation Criteria has 10 points allocated for SEDB utilization / participation. Part B: Contract Language contains 1-18 Disadvantaged Business Enterprise (DBE) Participation and states that there is no specific goal for this contract. *QUESTION:* What is SEDB? Are DBE and SEDB the same thing? What is the definition of SEDB utilization / participation and what is the specific participation goal? Or is there no goal and therefore no points in the Evaluation Criteria?

A16:   *See New section 3.1.A above on page 2 for clarification. There is an 8% SEDB participation goal for this contract, which translates to 10 evaluation points. Please see information included in 3.1.A at the beginning of this addendum.*

Q17:   We understand that eBenefits has not yet been implemented but that King County is planning to implement it. Do you plan to implement this in v8.0 prior to the start of the 8.9 upgrade? If so: A) Is

this task part of the upgrade project? B) Will this implementation be completed internally or is outside assistance required? C) Will eBenefits be rolled out only to employees paid out of PeopleSoft or will they include MSA paid employees as well?

A17: *No. We will not implement eBenefits in V8.0.*

Q18: Regarding the Scope of Work, page 13, *Prepare the County's PeopleSoft environment and staff to support the roll out to the entire County:* We understand that King County currently has 2 HR systems: PeopleSoft and MSA. Does the County plan on eliminating the MSA system and processing all employees through PeopleSoft? A) If so, is this task part of the upgrade project? B) If not, is the plan to keep MSA and the interface into PeopleSoft?

A18: *That is a subsequent phase. The PeopleSoft upgrade contract will be expired at that point.*

Q19: Regarding *Infrastructure Leadership and Load Testing* (RFP page 15) – Will the County provide the necessary tools to be used for load testing or should the selected partner provide those?

A19: *The consultant will be responsible for load testing. The County will not be purchasing any new load testing packages. The consultant may propose and provide load testing tools within the proposal.*

Q20: Regarding *User Procedures / Training.*.(Page 15 #12) – Will the County update its own training documentation and develop its own training with only guidance or review from the selected partner? What form of training would the County prefer (train-the-trainer / classroom-based / web-based / none /others?

A20: *Yes. The County will be responsible for creating and / or updating training documentation and materials and training delivery. The County expects the consultant team to provide some guidance for this activity. The County is still determining how to approach training related to the upgrade.*

Q21: Regarding Schedule (RFP Pate 15 #17) – Given that follow-on projects will leverage the newly-upgraded v8.9 environment, are there specific deadlines associated with these Initiatives? A) If so, what are these timeline dependencies? B) Further, is the County planning to add on functionality after the upgrade that should be taken into consideration during the upgrade?

A21: *The general plan is to start rollout of the County's HCM in early 2007. This project is expected to take over one year. The County also expects to add new functionality to the HCM in the 2007/2008 timeframe. The rollout to the rest of the County and the implementation of new and additional functionality will be a part of a separate contract opportunity (please also see revision for section 3.1.A & B at the beginning of this addendum):*

The County is not 100% certain about which new functionality will be added in the 2007 to 2008 timeframe. However, the following are likely candidates:

Core Competency
Performance Measurement
Position Management
Succession Planning

Q22: Does the County expect the selected partner to create the test plan, scenarios, and scripts? Will the County provide appropriate resources to conduct both system testing and user acceptance testing?

A22: *Yes, the Consultant will be responsible for creating the test plans, scenarios and scripts, and managing all aspects of testing. The County will provide test plans and scripts that it has used in the past for the Consultant's use if the Consultant chooses to. The County will provide appropriate resources to conduct system and acceptance testing.*

Q23: Is it safe to assume that the County uses customized reports? If so, does the County intend to update and test those reports itself, or should the selected partner assume this responsibility?

A23: *Yes, the County has customized reports. The Consultant will be performing the updating and testing of the reports in partnership with the County.*

Q24: QUESTIONS RELATED TO PEOPLETOOLS UPGRADE: APPLICATION USER INFORMATION
Technical

a) No of Installations (of application): 1

b) No of Databases in each Installation: 1

Environment	No. of Databases
Development & Test	See Section II 1.3
Upgrade and Conversion	See Section II 1.3
Production Standby	See Section II 1.3
Production	See Section II 1.3

Q25: APPLICATION DETAILS

a) PeopleSoft modules Implemented:

A25a:

Module	Implemented Y/N	If implemented, Version	No. of Companies / Division implemented
Core HRMS	Y	8.0 SP1	Approx. 6000 employees in 3 departments
Payroll	Y	8.0 SP1	Approx 6000 employees in 3 departments
Benefits Administration	Y	8.0 SP1	Approx 6000 employees in 3 departments
Time & Labor	Y	8.0 SP1	Approx 6000 employees in 3 departments
Self Service	Y	8.0 SP1	About 300 employees in 2 departments

b) Database Platform, Version and Size :

A25b:

Database	Version	Size
Oracle	8.1.7	204 GB

c) Details of PeopleTools related customization

A25c See Section II 1.2 King County Installation Outline in the RFP.

Q26: Architecture documentation (Brief detail of what is available)

(Availability of documentation will impact the planning effort and schedule)

A26: See Section II 1.3, The PeopleSoft Hardware and Software Environment.

Q27: Any Other Details (Please address the details which you feel can impact the Implementation/Upgrade/Support activity)

A27: See Section II 1.1, 1.2, 1.3.

Q28:   Company Information: Questions related to PeopleTools upgrade:

A28:

Company Name:	King County Department of Executive Services
Total no of employees :	15,000, of which 6000 are processed through PeopleSoft,
No. of Business Units:	1
No of Non-employees :	0

Q29:   Existing Applications:

A29a   Existing Applications Details :

Modules	Customization %	No. of Users
Core HRMS	See Section II 1.2	20
Benefits Administration	See Section II 1.2	4
Payroll	See Section II 1.2	20
Time and Labor	See Section II 1.2	75
Self Service/eApps	See Section II 1.2	15,000

Q29b: Pain areas in the existing system:

A29b: Time and Labor processing, slow HR data entry, Ben Admin – processing change flags, Security setup and maintenance

Q29c: What are the different departments in the organization?

A29c: See the online directory at: http://directory.metrokc.gov/GroupDetail.asp

Q29d: What is the reporting relationship between departments? Give details of Department tree.

A29d: See the online directory at: http://directory.metrokc.gov/GroupDetail.asp

Q29e: Is Position Management being used or is the system Job Code driven?

A29e: Position Management has not been implemented. The system is job code driven. There is a desire to implement Position Management in the near future after the Upgrade

Q29f: We understand that the following sub-systems have been custom-built. Please provide details on the same.

→ WA State Retirement Reporting Subsystem
→ Uniform allowance for Bus Drivers
→ MSA payroll printing

A29f: WA State Retirement Reporting Subsystem – This system extracts retirement data from both the MSA and PeopleSoft payroll systems and creates reports that are delivered to the state. It involves a large amount of SQR programming, and around 40 online pages.

Uniform Allowance – this system enables the transit group to manage and account for their uniform expenses. It has a few small SQR programs and around 10 online pages.

MSA Payroll Printing – The MSA payroll data is imported into 16 custom tables that closely resemble the delivered PeopleSoft payroll structure. It involves one large SQR that imports and validates the data and 4 custom paycheck printing SQRs.

Q29g: Please provide diagram(s) depicting the integration points between PeopleSoft and 3rd party systems.

A29g: *See Chart attached as RFP 137-05RLD Addendum **Exhibit #1** (Included as an attachment to e-mailed versions of this addendum, and available via hyperlink on the web-posted version).*

Q29h: Please provide details on the security that has been implemented.

A29h: *Security has been implemented by role using department trees.*

Q29i: Legacy System details: It is understood that the County is using a Legacy system to process payroll for 8,000 employees and the same has to be moved into PeopleSoft.

Please provide the application details regarding

A29i: *Moving employees from the Legacy system to PeopleSoft is not part of the Upgrade project. It will be done after the Upgrade is complete through other projects.*

→ Functionality: how is it different from the existing PeopleSoft application? Please elaborate

The Legacy system is a mainframe based non-relational system

→ Integration with PeopleSoft (in any)

We have regular interface processes that bring over some HR and paycheck data from the legacy system into the PeopleSoft Oracle database and we run ad-hoc queries and print paychecks from that data

→ Is Employee data in the Legacy system also present in current PeopleSoft HRMS? Please clarify.

Some employee data has been brought over into the PeopleSoft Oracle database

Q29j: Any Other details

A29j: *Benefits – We anticipate processing the 8,000 employees not currently paid in PeopleSoft (even though we cut checks for them) through e-Benefits for at least open enrollment purposes, but in another instance (a one-off for benefits purposes only).Currently no benefits data is maintained for these employees in the production instance. We will be converting and maintaining benefits for them in the one-off instance until the process is integrated back into production, through another project.*

Q30: General Information

Q30a: Describe your company's organization. (Is there one or many legal entities? Do you maintain/report information on multiple entities?)

A30a: *See response to #29c*

Q30b: Describe the organization of your HR department. Identify which HR functions are broken-out by department? What other departments do they interface with regularly?

A30b: *See response to #29c*

Q30c: What changes do you envision for the HR department in the short term and long term? (high level vision of strategic role of HR organization)

A30c: *This will be clarified during the Discovery days.*

Q30d: How many years of history are you currently maintaining?

A30d: *Five years.*

Q30e: Do you have different compensation practices with these different entities?

A30d: *This will be clarified during the Discovery days.*

Q30f: Do you have any paid retirees or income continuation plans?

A30f: No.

Q31:   PeopleSoft Upgrade Information

Q31a: Have all legacy systems (which were intended to be discontinued) been retired?

A31a: No.

Q31b: If consultants were used for the implementation, are any consultants still supporting production? If yes, please identify from which functional and technical areas.

A31b: Consultants were used for the initial implementation of PeopleSoft and in the upgrade from version 7 to 8. Currently, there are no consultants supporting production.

Q31c: Please briefly describe any major challenges or issues encountered during the PeopleSoft HRMS implementation.

A31c: This will be clarified during the Discovery days.

Q31d: Will your current hardware configuration be able to support a minimum of 2 upgrade databases (copies of production) and 1 demo environments?

A31d: No. An effort is under way to put a new architecture and new hardware in place.

Q31e: Do you have any upgrade dependencies or timeline restrictions in the next 6-8 months? For example, upgrade must be completed prior to fiscal year end?

A31e: Yes.

Q31e: Are there any projects other than ABT project that is dependent on the upgrade completion? If so, describe the projects at a high level.

A31f: The Benefits Health Information Project, which is implementing eBenefits using PeopleSoft 8.9 as part of another project, will be affected by any delays in the upgrade.

Q32:   Data Volumes

Q32a: Number of Employee records currently in the database (actives, leaves of absence, terminations, rehires)

A32a: This will be clarified during the Discovery days.

Q32b: Number of Retirees maintained on the system. Do you process payroll and benefits for retirees?

A32b: This will be clarified during the Discovery days.

Q32c: Applicants Volume – approximately how many applications do you receive in a month?

A32c: This will be clarified during the Discovery days.

Q32d: Turnover Rate – approximately how many employees do you terminate and hire in a month?

A32d: This will be clarified during the Discovery days.

Q33:   Human Resources - Core HR Functionality

Q33a: Is your HR department centralized or de-centralized? Identify for both data entry and processing.

A33a: Decentralized for both data entry and processing.

Q33b: How many companies are you using? Please describe logic of company division. (i.e.: EIN, geographic region, business division, etc.)

A33b: *One*

Q33c: How many business units are you using? Please describe logic of business unit division. (i.e.: country, geographic region, business division, etc.)

A33c: *Two - KCBUS for PS paid Ees and KCMSA for MSA paid Ees.*

Q33d: For which tables are you using set-id functionality? (which tables have shared codes versus segregated codes)

A33d: *One set-id KCSET is used on all applicable tables.*

Q33e: Do you use multiple job functionality?

A33e: *No.*

Q33f: Do you have temporary job assignments? (i.e.: an employee is temporarily assigned to another job code while still employed under their substantive job code)

A33f: *Yes – we currently just insert additional job rows to show the type of temporary assignment (acting or lead pay).*

Q33g: Do you have any remote employees (employees who work out of their home?)

A33g: *None that work from home exclusively*

Q33h: Do you have any unionized employees? If so, how many unions do you have?

A33h: *Yes, approximately 63 unions with 92 bargaining units (contracts).*

Q33i: Are you tracking disciplinary actions and grievances in the system?

A33i: *Not yet. The County has made modifications to the Manage Labor Relations module which may be used as a pilot project through the rest of 2005.*

Q33j: Do you maintain non-employee data on the system?

A33j: *No.*

Q33k: What types of employees makeup your workforce? Regular, temporary, part-time, part-time with benefits, interns, contractors, exempt, non-exempt?

A33k: *Reg/Temp/TLT; part-time/full-time; some part-time with benefits; intern, appointed; FLSA-Exempt and Non-Exempt.*

Q33l: What employee dates do you track and what are your rules for determining each? Examples include: hire/rehire dates, company seniority dates, service date, etc. How do you account for breaks in service?

A33l: *Hire, rehire, company seniority, service date (can be adjusted for unpaid LOA > 30 days), date of last increase, probation date, last date worked, expected return date (not required), dept. entry date, job code entry date, grade/step entry dates.*

Q33m: How are employee status changes communicated? (i.e.: promotions, transfers, LOAs, terminations, etc.)

A33m: *The County uses Personnel Change Notice form (PCN) for all job related changes. The data is approved by the supervisor for entry into PeopleSoft. A copy is to be filed in the Ees personnel file.*

Q33n: How are employee personal data changes communicated? (i.e.: address changes, name changes)

A33n: *We use Personal Data Change Notice form (PDCN) for all changes to Ees personal data (i.e.; phone, address, name, etc.).*

Q33o: Do you use PeopleSoft's monitor absences management module?

A33o: *No.*

Q33p: Do you issue company stock options? If yes, are you outsourcing the stock administration process or using a 3rd party package?

A33p: *No.*

Q33q: Do you have employee pension? If yes, are you outsourcing the pension administration process or using a 3rd party package?

A33q: *Yes. We have employee pension. The State of Washington provides pension administration.*

Q34:   Compensation

Q34a: Do you perform job evaluations? What method is used? Is the evaluation information maintained in PeopleSoft?

A34a: *Yes. King County uses its own method which may be clarified during Discovery Days. Evaluation information is not maintained in PeopleSoft.*

Q34b: Are you currently using the Multiple Components of Pay within PeopleSoft? What components of Pay does your organization use? (i.e.: shift differentials, hazardous work pay, etc)

A34b: *No. The County has many different components of pay. The County would like to look at this functionality during upgrade for possible new use.*

Q34c: Do you have min/mid/max or multi-step salary grades? Or both?

A34c: *Both.*

Q34d: Do you have geographic differentials for your salary grades?

A34d: *No.*

Q34e: Describe your performance and salary review process? When is it performed?

A34e: *Performance reviews are generally done in the fall for pay increases to be implemented 1/1 of the following year. Some contracts allow for annual step increases w/out evaluations. We refer to these as auto step increases. Employees also receive cost of living adjustment (COLA) usually on 1/1 of the year or the date specified in their union contract.*

Q34f: Do you use a salary increase matrix to assist with determining increases?

A34f: *As we currently have two payroll systems, we have matrixes to track which bargaining units are eligible for COLA, auto step increase, performance increase or merit (pay above top of salary grade). This matrix is kept outside of PS.*

Q34g: Do you automatically perform step increases after a certain period of time for employees?

A34g: *Not at this time. Depts. handle the auto step progressions manually themselves as they need to determine if Ees that have been on any unpaid leave time should progress to next step or not.*

Q34h: Do you perform mass increases, such as Cost of Living Adjustments (COLAs) at certain times of the year for all or specific employees?

A34h: *Bulk of Ees receive COLA on 1/1 of the year. Some contracts have other specified date for COLA increase. We do use a custom mass change process currently to insert the job rows with the rate increase.*

Q34i: Do you have employee salaries that are allocated across various departments?

A34i: *No.*

Q34j: Are pay rate changes automated or manually entered?

A34j: *Manually entered.*

Q34k: How many different Rating Models is your organization using? Are you maintaining the rating model in PeopleSoft?

A34k: *This will be clarified during the Discovery days.*

Q34l: Are you utilizing the salary increase by group functionality? If not, is there an interest to use this functionality?

A34l: *No. Would like to understand how this functionality could benefit the County.*

Q34m: Do you have variable compensation? (i.e.: 70% of employees pay is based on base pay while 30% is based on variable components)

A34m: *No.*

Q35:   Regulatory Reporting

Q35a: Are you using Establishment ID's? How many do you have?

A35a: *Yes. We have one.*

Q35b: If you operate in multiple countries, are there special legal issues to be considered for different countries?

A35b: *Not applicable.*

Q35c: What regulatory reports are you responsible for reporting? (i.e.: adverse impact, EEO, Job Group Analysis, PRWORA, OSHA, VETS-100, etc)

A35c: *Not sure of all of the reports. King County Diversity group uses a custom database to combine Ee info from both payroll systems to do reporting for EEO, etc.*

Q35d: Do you have any professional compliance requirements for your workforce?

A35d: *Yes. CDL, certifications, various other licenses depended upon Ees job.*

Q35e: Any other Special Regulatory Compliance issues?

A35e: *No.*

Q36:   Employee Development

Q36a: Do you administer internal training and does your organization maintain a training transcript for your employees?

A36a: *Yes.*

Q36b: Are you utilizing PeopleSoft's administer training module to administer and track employee training? If yes, please describe any issues.

A36b: *Yes. Currently using for all King County training. Some external training has been entered also.*

Q36c: If not, identify other methods for tracking training information. Also, identify if your organization is interested in using PeopleSoft's Administer Training module.

A36c: *Depts. may also have side systems (custom) to track training with more details that PS allows (back fills, schedules, cost of back fill, etc.).*

Q36d: Do you establish training budgets?

A36d: No.

Q36e: Are you utilizing PeopleSoft's budget training module? If yes, please describe any issues.

A36e: No.

Q36f: If not, identify how you are currently tracking training budgets. Also, identify if your organization is interested in using PeopleSoft's budget training module.

A36f: This will be clarified during the Discovery days.

Q36g: Does your organization have defined competencies and accomplishments?

A36g: This is an area the County is exploring through the ABT program.

Q36h: Are you utilizing PeopleSoft's Manage Competencies module to administer employee competencies? If yes, please describe any issues.

A36h: No.

Q36i: If not, identify how you are currently tracking employee competencies. Also, identify if your organization is interested in using PeopleSoft's Manage Competencies module.

A36i: The County is not currently tracking employee competencies in PeopleSoft. We would like to see how this module could be used to benefit the County. This is on our list for implementation post 8.9 upgrade, which will be a separate contract undertaking.

Q36j: Does your organization perform career planning?

A36j: Not in PeopleSoft.

Q36k: Are you utilizing PeopleSoft's career planning module to track career plans? If yes, please describe any issues.

A36k: No.

Q36l: If not, identify how you are currently tracking employee career plans. Also, identify if your organization is interested in using PeopleSoft's Career Planning module.

A36l: We would like to see how this module could be used to benefit the County. This is on our list for implementation post 8.9 upgrade, which will be a separate contract undertaking.

Q36m: Does your organization perform succession planning?

A36m: Not in PeopleSoft.

Q36n: Are you utilizing PeopleSoft's Succession Planning module? If yes, please describe any issues.

A36n: No.

Q36o: If not, identify how you are currently tracking succession planning. Also, identify if your organization is interested in using PeopleSoft's Succession Planning module.

A36o: We would like to see how this module could be used to benefit the County. This is on our list for implementation post 8.9 upgrade, which will be a separate contract undertaking.

Q37:   eDevelopment

Q37a: Do you currently use eDevelopment? If not, do you intend to use this module in the near future?

A37a: Yes.

Q37b: Do you currently allow your employees to request and monitor their own training?

A37b: *They can monitor their training, but cannot sign up on-line. Ees still have to use the paper process to register for classes.*

Q37c: Do training requests need to be approved? How and by whom?

A37c: *Yes. By supervisor on paper copy.*

Q37d: Do you allow your managers to view training related information with regards to their direct reports?

A37d: *Yes.*

Q38: Payroll

Q38a: Is your payroll department centralized or de-centralized?

A38a: *Partially centralized.*

Q38b: Describe the organization of your Payroll Department. How many people do you have supporting the payroll process? How do they interface with other departments? How are they organized? Are there any security restrictions as to what information they can see?

A38b: *Payroll department consists of one supervisor, two business officers, three accountants, ten account tech's. They communicate through emails, phone calls, direct mail and courier services with other department users. Reasonable Security restrictions are in place to view/share confidential data*

Q38c: How many Paygroups do you have? What is the process that you have to determine how an employee is enrolled into a Paygroup? Please describe.

A38c: *One Paygroup.*

Q38d: What employee types are you currently paying? (hourly, salaried, exception hourly, unions, special pay rules, shifts, exceptions)

A38d: *Hourly, exception hourly*

Q38e: How often do you pay your employees? Weekly, Biweekly, Monthly?

A38e: *Biweekly.*

Q38f: What are valid pay frequencies (weekly, bi-weekly, semi-monthly, etc.)

A38f: *Biweekly.*

Q38g: Do you pay in any currencies other than US? If so, please list.

A38g: *No.*

Q38h: Please describe your current payroll processing schedule.

* How many days are in your payroll cycle?

* What processing happens on each day of the cycle? (e.g. when do you create paysheets, load T&L hours, update one-time deductions, earnings, taxes, load retro pay and retro benefit/deductions, run preliminary calc, run final cal, confirm, reports, print checks/advices etc.)

A38h *Payroll processing cycle is performed over a two day period.*

* First day typically is used to run presheet audit, load T & L hours, update one time earnings/deductions, preliminary calc etc.,

* Second day is used to enter online payroll adjustments, short calculations, run validation queries, final calc, confirm, leave processing, labor distribution, direct deposit file creation, creating pay stub files and upload payroll data for web reporting.

Q38i: Approximately how many paychecks do you process each payperiod?

A38i: 5600.

Q38j: Do you perform any on-demand (on-line) checks?

A38j: Yes.

Q38k: Do you perform any check reversals or adjustments?

A38k: Yes.

Q38l: Do you only generate checks on-cycle? Do you generate any checks using payroll off-cycles?

A38l: Use both on cycle and off cycle.

Q38m: Do you use concurrent processing? If so are you experiencing any issues with this? Please describe.

A38m: Yes. No issues.

Q38n: Do you have a "lock-out" period for users when processing payroll? If so, when is it? How long does it last? Are there any issues with this?

A38n: No lock-out.

Q38o: Are you using the Continue with Errors Functionality? If so, are you experiencing any issues with this? Please describe.

A38o: No.

Q38p: Are you using Final Check Processing? If so, are you experiencing any issues with this? Please describe.

A38p: No.

Q38q: Are you using Retroactive Pay and Retro Benefit/Deduction Processing? If so, are you experiencing any issues with this? Please describe.

A38q: No.

Q38r: Are you using FLSA Processing? Are you experiencing any issues with this? Please describe.

A38r: No.

Q38s: Do you have union employees? If so, are there any special union processing issues? Please describe.

A38s: Yes. Special processing to calculate dues for some union employees and pension trust amounts.

Q38t Do you perform any special union dues deduction calculation routines?

A38t: No.

Q38u: Do you have any special garnishment processing rules? Any multi-state garnishments? Any proration? If so, please describe. Are you currently experiencing any issues with this?

A38u: No. Some are multi-state garnishments. No proration rules are used.

Q38v: Please provide a list of your current Interfaces to and from your Payroll Application.

*A38v: List is attached as RFP 137-05RLD Addendum **Exhibit #1** (Included as an attachment to e-mailed versions of this addendum, and available via hyperlink on the web-posted version).*

Q38w: Do you have a company policy for Direct Deposit only? Or, do you allow for direct deposits and live check generation?

A38w: No. Both direct deposits and live checks are allowed.

Q38x: Are there special issues around direct deposits? Please describe your process and any issues.

A38x: No. We create custom interface file during payroll processing and transferred to bank two days after.

Q38y: Do you allow multiple accounts for direct deposit?

A38y: Yes.

Q38z: What is your paycheck/advice distribution to your employees? In house distribution, mail, etc.?

A38z: In house distribution by mail stops.

Q38aa: Are there special processing rules around shift pay? If so, please describe.

A38aa: Shift pay including in either base pay or pay through separate earning code. We are not using shift pay processing.

Q38ab: Do you report shift premium separately on paycheck? Or do you pay shift as part of the employee's base hourly rate?

A38ab: This will be clarified during the Discovery days.

Q38ac: Please provide a list of current deductions include deduction code, deduction type and a description. (Indicate which deductions appear on paycheck. Are any rolled up into a consolidated deduction on paycheck?)

*A38ac: Yes, we do roll-up at printing due to space limitations. Approx 430 deduction codes were setup. List is attached as RFP 137-05RLD Addendum **Exhibit #2** (Included as an attachment to e-mailed versions of this addendum, and available via hyperlink on the web-posted version). All deductions are shown in pay stub.*

Q38ad: Please provide a list of current earnings include earnings code, earnings type and a description. (Indicate if it applies to GTL, is this earnings exempt from FUTA/SUTA/FICA? Is it applicable to 401k and/or pension (for special accumulators)? Identify which earnings appear on paychecks.)

*A38ad: Approx 215 earnings were setup. The earnings list is attached as RFP 137-05RLD Addendum **Exhibit #3** (Included as an attachment to e-mailed versions of this addendum, and available via hyperlink on the web-posted version). All earning codes appear on the pay stub.*

Q38ae: Please provide a list of current additional pays include earnings code and a description. (volume of employees and frequency)

*A38ae: Earnings list is attached as RFP 137-05RLD Addendum **Exhibit #3** (Included as an attachment to e-mailed versions of this addendum, and available via hyperlink on the web-posted version).*

Q38af: Are any special bonuses awarded to employees? How are they administered?   Are they included on regular on-cycle paychecks or processed off-cycle.

A38af: No.

Q38ag: Do you allow for mid-pay period Job changes, i.e., salary, job, etc.?

A38ag: Yes.

Q38ah: Do you allow for deferred compensation?

A38ah: Yes.

Q38ai: Do you generate one check for employee's that have multiple jobs? Or, do you generate a separate check for each job?

A38ai: This will be clarified during the Discovery days.

Q38aj: Do your employees accrue leave? (What specific types – vacation, sick, personal, PTO, holiday etc) Are you using the Leave Accrual Process? Are you experiencing any issues with this process? Please describe.

A38aj: Yes. Employees accrue vacation, sick leave, personal holidays. Leave accrual process is used to process leaves. There are no issues anticipated at this time.

Q38ak: Do you archive historical data? If so, how often is this done? How do you report against this data? How do you access this data?

A38ak: No, we have not archived any historical data since we went live with PeopleSoft in 1999. This will be considered and analyzed in the near future.

Q38al: Are there any external forms used to capture payroll data to be input into the current system?

A38al: No.

Q38am: Are there more than ten separate pay groups used?

A38am: No.

Q38an: Is more than 10% of the workforce part time, temporary or seasonal?

A38an: No.

Q38ao: Do you pay union employees?

A38ao: Yes.

Q38ap: Do you use more than 50 earnings codes?

A38ap: Yes.

Q38aq: Do you use more than 25 deduction types?

A38aq: Yes.

Q38ar: Are employee expenses paid through payroll?

A38ar: No.

Q38as: Are off-cycle runs used to pay bonuses, commissions, quarter and year end adjustments, etc.?

A38as: Off-cycle runs are used for special retroactive payments, lawsuit settlement payments and adjustments.

Q38at: Do you have or need the ability to process multiple compensation rates?

A38at: Yes.

Q38au: Is PeopleSoft Payroll calculating your FLSA overtime rates?

A38au: No.

Q38av: Do you outsource tax filing?

A38av: No.

Q38aw: Do you outsource check and advice printing?

A38aw: No.

Q38ax: Does the payroll department currently use PeopleSoft Workflow?

A38ax: The ePay application uses workflow to send W2 re-issue requests to a payroll administrator worklist

Q38ay: How many active employees are on the payroll?

A38ay: Six Thousand.

Q38az: Approximately how many retirees are currently on the payroll?

A38az: Zero.

Q38ba: Approximately how many non-employees are in the system?

A38ba: Zero.

Q38bb: How many pay frequencies?

A38bb: One.

Q38bc: How many Companies?

A38bc: One.

Q38bd: How many Federal Employer Identification Numbers?

A38bd: One.

Q38be: How many Pay Groups?

A38be: Two.

Q38bf: Number of normal pay runs per year?

A38bf: Twenty-six.

Q38bg: Number of special pay runs per year?

A38bg: One or two

Q38bh: Number of Local taxes you process?

A38bh: One.

Q38bi: Approximately how many W-2's processed last year?

A38bi: Six thousand-three hundred.

Q38bj: How many Inbound interfaces into payroll – 3rd parties?

A38bj: Zero.

Q38bk: How many Outbound interfaces from payroll – 3rd parties?

A38bk: Fifteen.

Q38bl: Number of internal interfaces (example – GL)?

A38bl: Ten.

Q38bm: Number of Custom Reports per pay run?

A38bm: Twenty.

Q38bn: Are you planning to leverage the following enhancements to Enterprise Payroll for North America?

* Alternative Overtime
* Time and Labor

A38bn: Time and Labor is already implemented. The County has no plans to implement alternative overtime.

Q39: ePay

Q39a: Do you intend to use new online Payslip functionality in the new release?

A39a: Yes.

Q39b: Which transactions have been implemented? What types of customizations have you done with ePay? Describe them briefly. Has workflow been implemented? If so, on which transactions? Has workflow been customized? To what extent?

A39b: Direct deposit change, W-2 reissue request, W-4 changes, View paycheck, view voluntary deductions. All of the above referenced transactions include some customizations. Workflow is used for W-2 reissue request.

Q39c: Are you using any Employee Self Service through your Payroll Service provider?

A39c: No.

Q40: Time and Labor

Q40a: What functionality will you continue add or enhance in Time and Labor for this upgrade or in the near future?

* Time Collection Devices/Elapsed/Punch Time
* Time Reporting Codes
* Rules
* Load Time and Labor Data to Payroll
* Compensatory Time Plans
* Costing
* Scheduling
* Time Reporting
* Labor Distribution
* Financials Integration

A40a: We will consider all of the above as opportunities arise.

Q40b: Are you currently reporting time to costing departments? Do you labor distribute hours and interface in Time and Labor to GL?

A40b: Yes.

Q40c: Are you currently leveraging Time Collection Device integration with Time and Labor?

A40c: No.

Q40d: Do you intend to leverage Time and Labor rules engine to enhance or replace customization in the prior release?

A40d: Yes, if possible. We have significant rules customization.

Q41: eTime

Q41a: Do you intend to track time for contingent workers?

A41a: This has not been decided yet, but we would like to explore the concept.

Q42: Base Benefits, Benefits Administration and eBenefits: ***Base Benefits***

Q42a: Employee benefit enrollment, deductions, dependent enrollment and beneficiary data can be tracked in a variety of systems (e.g. paper files, PeopleSoft HRMS and Third Party Administration systems). In identifying the most accurate source for this data, please identify the number of unique sources required:

A42a: Currently benefits data is maintained in HRMS system via Ben Admin. However, there is currently a side system for capturing beneficiaries which will be integrated into PeopleSoft production at a later date.

Q42b: Are all your organization's employees based in United States? Are any of your employees covered by Canadian or International benefits?

A42b: All are in the U.S.

Q42ce: How many benefit programs are offered?

A42c: The County has 18 active benefit programs, most with 2 additional variations for leave (health continuation, including FMLA, and no-health leave plan) – may be reducing that slightly next open enrollment. Also have a number of discontinued benefit programs.

Q42d: How many flexible credit plans are offered?

A42d: The County has a single credit rate on waive in certain benefit programs that converts to $60 paid as cash earnings and subject to normal taxation.

Q42e: Is dependent enrollment data tracked for eligible plans?

A42e: Yes.

Q41h: Is beneficiary data tracked for eligible plans?

A42f: Except for Bond beneficiaries for employees paid in PeopleSoft, beneficiary data is not tracked for eligible plans at this time. However, we have a child life plan that is being seen as an employee plan and the enrollees as "beneficiaries" because apparently they could not clone the dependent life plan when we went live in V7.02. We have suppressed the requirement to have % at all.

Q41i: Does your organization track savings plan elections on PeopleSoft?

A42f: Not at this time, but we expect to when we go to 8.9 since it provides 457 plan administration.

Q42g: Does your organization track investment allocations on PeopleSoft?

A42g: No, not at this time.

Q42h: Does your organization offer domestic partner and domestic partner dependent coverage?

A42h: Yes.

Q42i: Does your organization track court orders for dependents on PeopleSoft?

A42i: Yes.

Q41j: Are there situations where benefits enrollments or changes must be adjusted retroactively?

A42j: Yes.

Q42k: If the answer is yes to the question above, does your organization use PeopleSoft Retroactive Deductions?

A42k: No.

Q42l: Are you using PeopleSoft's FMLA eligibility and tracking module?

A42l: *Not at this time.*

Q42m: Are you currently using the COBRA module?

A42m: *Not at this time.*

Q42n: Does your organization track Retiree H&W plan enrollment in PeopleSoft?

A42n: *No.*

Q42o: How does your organization administer FSA Claims?

A42o: *No.*

Q42p: Do you plan on implementing the new Multiple Annual Benefits Base rate functionality?

A42p: *This will be clarified during the Discovery days.*

Q43:   Base Benefits, Benefits Administration and eBenefits: ***Benefits Administration***

Q43a: Number of benefit open enrollments offered per year? How many open enrollments are processed through PeopleSoft Benefits Administration?

A43a: *One open enrollment period (1/1/xx through 12/31/xx). In the past only employees paid in PeopleSoft were processed through Ben Admin, but we are anticipating a one-off instance to allow all benefits-eligible employees to be processed through e-Benefits for Open Enrollment 1/1/07.*

Q43b: Number of active employees processed through open enrollment?

A43b: *Currently approximately 6000, but expect it to be 15,000 by 1/1/07.*

Q43c: Number of retirees processed through open enrollment?

A43c: *Zero.*

Q43d: Number of COBRA enrollees processed through open enrollment?

A43d: *Zero.*

Q43e: Number of unique benefit eligibility groups?

A43e: *If you mean BAS GRPID; 2 currently, but will have 3 by 2007.*

Q43f: Are employees' benefit enrollment forms generated in PeopleSoft?

A43f: *No.*

Q43g: Are employees' confirmation forms generated in PeopleSoft?

A43g: *Yes.*

Q43h: Are OE enrollment forms prepared by a third party vendor?

A43h: *No – they are created and printed in house from downloads from PS, just distributed by a mailing company.*

Q43i: Are OE confirmation forms prepared by a third party vendor?

A43i: *No – we have a one-page confirmation form mod*

Q43j: Are employees benefit elections posted to PeopleSoft?

A43j: *Yes.*

Q43k: Are benefit premium rates automatically calculated by PeopleSoft?

A43k: *Yes, once setups are established or updated*

Q43l: Are benefit enrollments dependent on cross plan validation (e.g. Employee must enroll in both medical and dental plans, or waive both)?

A43l: Yes.

Q44: Base Benefits, Benefits Administration and eBenefits: ***Benefits Administration - Eligibility***

Q44a: Does your organization use PeopleSoft Benefits Administration to automatically determine eligibility for one or more benefit programs?

A44a: Yes.

Q44b: Does your organization use PeopleSoft Benefits Administration to automatically determine eligibility for one or more Health and Welfare plans?

A44b: Not sure what you mean by Health and Welfare plans.

Q44c: Are health plans offered based on the employee's home or work location zip code?

A44c: Not currently set up for geographic location criteria so all employees have same options; however, one carrier may be establishing a different policy number based on home zip (which would require a new plan and eligibility rule).

Q44d: Does your organization use PeopleSoft's geographical location eligibility?

A44d: Not at this time.

Q44e: Are employees grandfathered into eligibility for benefit programs or plans?

A44e: No.

Q45: Base Benefits, Benefits Administration and eBenefits: ***Benefits Administration - Event Maintenance***

Q45a: Does your organization process events for employee based on the passage of time (passive events)?

A45a: Yes, dependents reaching maximum age and 1 year in service in certain benefit programs to trigger vacation. This is a modification.

Q45b: Does your organization use PeopleSoft's Event Maintenance? If yes, which benefit events are processed through PeopleSoft?

A45b: Yes. All events are processed through Benefit Administration.

Q45c: Number of benefit status changes processed per year excluding open enrollment?

A45c: For the 6000 employees currently processed using Ben Admin, approximately 5000 events went to finalized and enrolled while approximately 9200 events went to prep none. That will increase when we use e-Benefits and process the additional 9000 employees through Benefit Administration.

Q45d: Does your organization process Open Enrollment elections using Benefits Administration?

A45d: Yes.

Q45e: Version 8.9 offers significant enhancements to the Event Rules tables that may enable you to use fewer event rules. Do you plan on doing a complete review of your event classes and event rules as part of this upgrade?

A45e: Yes. We will review the new functionality and, if it improves on what we currently have, implement it.

Q45f: Do you anticipate making significant changes and/or additions to your current event classes?

A45f: *No.*

Q45g: Do you anticipate making significant changes and/or additions to your current event rules?

A45g: *The Fit-Gap analysis will determine if we have to make these changes.*

Q45h: Do you anticipate making significant changes and/or additions to your current eligibility rules?

A45h: *Probably as we have new plans 1/1/07 and so we must set them up and test in 8.9. Fit-Gap analysis will inform this decision.*

Q46: Base Benefits, Benefits Administration and eBenefits: **eBenefits**

Q46a: Is your organization using any of PeopleSoft's eBenefits transactions? If yes, please identify which transactions are being used:

A46a: *Not at this time, but will for OE 2007, so they will need to be tested in 8.9. At this time, Open Enrollment is the most likely event to be processed via e-Benefits.*

Q46b: Does your organization use a third party administrator for employee H&W self-service processing?

A46b: *No.*

Q46c: Does your organization use a third party administrator for employee savings self-service processing?

A46c: *Currently employees make changes in 457 plan elections directly with T Rowe Price as 457 plans aren't supported in 8.0.*

Q45d: Does your organization provide links to third party benefit vendor sites?

A46d: *Not directly through PeopleSoft, but we will when we implement e-Benefits fall 2006 for OE 2007.*

Q46e: Are you currently using the delivered self-service events to allow an employee to instigate benefits events such as Family Status Changes?

A46e: *No, but that may be on the horizon after we get through OE 2007.*

Q46f: If so, does your organization require benefits self-service transactions to be approved by a Benefits Administrator? If so, which ones?

A46f: *Not yet determined.*

Q46g: If not, would you be interested in implementing this functionality with this upgrade?

A46g: *Not yet determined.*

Q47: Reports, Interfaces, and Batch Processes

Q47a: What level of effort do you expect in retrofitting custom queries for the upgrade?

A47a: *The largest effort will be in organizing, documenting and determining which queries are currently in use and whether they should be upgraded. It is assumed that this will be determined as part of the fit gap analysis, and that all queries that are identified as having value will be upgrade.*

Q47b: How are your reports distributed? On-line or on hardcopy format? If electronically, what report distribution tool do you use?

A47b: *Users access their own reports via the process monitor. There is not an automated distribution process in place*

Q47c: Are there any external forms used to capture HR data to be input into the current system? What are they and what data is captured?

A47c: *This will be clarified during the Discovery days.*

Q47d: Are you expecting any turnaround document from the system to confirm a transaction has been processed?

A47d: *This will be clarified during the Discovery days.*

Q47e: What other systems does your current PeopleSoft HRMS system interface with? Please list and briefly describe.

A47e: *See the interfaces chart and the interface descriptions attached as RFP 137-05RLD Addendum **Exhibit #1** (included as an attachment to e-mailed versions of this addendum, and available via hyperlink on the web-posted version) and the response to Q92 in this addendum.*

Q47f: Are you maintaining your department security tree? Do you have any other tree's that are being maintained?

A47f: *Yes, we are maintaining our department security tree. No, there are no other trees maintained.*

Q47g: Are you currently using any of the delivered PeopleSoft Workflow? Which ones?

A47g: *Currently using only one workflow tool within the ePay application. This sends W2 reissue requests to a worklist.*

Q47h: What processes do you currently run on a regular basis (such as PERS_DATA_EFFDT, etc.)? Are these processes scheduled through the Process Scheduler?

A47h: *HR_PERSDATA, PER099, PRCSPURG, and a few other custom reports and processes. Yes, there are processes scheduled through the Process Scheduler.*

Q47i: How many asynchronous and synchronous interfaces? What is the Volume of both synchronous and asynchronous interfaces? Peak volume? Frequency?

A47i: *There are no asynchronous interfaces currently. See the detailed interfaces listing for a summary of the sychrounous integrations. Additional details such as volumes and frequency could be made available during the discovery phase.*

Q47j: Is there an existing middle-ware which the interfaces are going through (i.e. Vitria)? Given that PeopleSoft 8.4x Tools provides an Int. Broker.

A47j: *No.*

Q47k: Do you have any File I/O interfaces?

A47k: *Most of our integrations involve file I/O.*

Q47l: How open is the county to HTTP interfaces? Are your interfaces Database-to-Database interfaces.

A47l: *We are open to considering new integration technologies. A small number of interfaces involve database to database interfaces via secure views and database links.*

Q47m: How many custom batch programs for both business and maintenance? OOTB PeopleSoft doesn't provide a lot of maintenance functionality, especially for security.

A47m: *This will be clarified during the Discovery days.*

Q48: System Administration/Security

Q48a: Are you using Row Level, field level Security? What other levels of security are currently being maintained (i.e. query security, etc.)?

A48a: Yes we are using row and field level security. Standard security methods are in place to manage query access, process monitor access, PeopleTools access, and other application specific access

Q48b: How are your departments organized? Hierarchically? Are you using these departments as part of your security?

A48a: County departments have a financial structure and an organizational structure. They are both hierarchical and are very similar. The financial structure is being used for our department security tree

Q48c: What security "groups" currently exist? (i.e. to accommodate batch processing for salary planning, etc.)

A48c: This will be clarified during the Discovery days.

Q48d: Do you use the delivered PeopleSoft Permissions Lists and Roles? Have you created new Permission Lists and Roles?

A48a: We use the delivered PeopleSoft Permissions Lists and Roles, and have customized and created many more.

Q48e: Is there currently a process in place to request new/modified security access? Who initiates? Who approves?

A48a: This will be clarified during the Discovery days.

Q48f: What system auditing capabilities are being utilized?

A48a: This will be clarified during the Discovery days.

Q48g: What LDAP platform will be used for the LDAP implementation?

A48a: This will be clarified during the Discovery days.

Q48h: Are all IT departments such as directory services, operating system administrators positioned and prepared for the implementation?

A48a: This will be clarified during the Discovery days.

Q49: Workflow

Q49a: Who will assist in configuration and setup of workflow security objects?

A49a: The consulting team will be responsible for this setup and configuration task working closely with the county's functional and technical staff.

Q49b: Are you using separate workflow objects i.e. Roles and Permission Lists for workflow security?

A49b: The one small piece of workflow we are currently using does involve an additional role and permission list.

Q49c: Do you have plans of leveraging workflow functionality for self-service applications such as W4 email notification changes or work lists?

A49c: Yes, we would like to take advantage of workflow functionality delivered in 8.9.

Q50: Knowledge Transfer

Q50a: How do you intend to backfill FTE resources working on production related tasks for knowledge transfer?

A50a: We plan to hire Term Limited Temporary employees for backfill..

Q50b: What are the high level deliverables for knowledge transfer?

A50b: The ultimate goal is to increase County PeopleSoft knowledge, skills and proficiency and enable county staff to support the system.

Q50c: How was training delivered during implementation project? Do you intend on using the same process for knowledge transfer?

A50c: Key functional and technical staff were sent to PeopleSoft training sites for in-depth training and on their return trained end-users. We are open to proposals of effective methods.

Q51: Regarding Page 6, Section 1.0 Introduction

Q51a: How long did it take the County to upgrade to PeopleSoft 8.0 SP1, which was completed in June of 2003?

A51a: 2 years.

Q51b: Per RFP 167-03RLD, King County was planning to implement Administer Training, Managing Labor Relations, Family Medical Leave Act (FMLA), eRecruit, and ePay in 2004. How long did this PeopleSoft implementation project last?

A51b: Six months.

Q52: Regarding Pages 7-8, Section 1.2 King County Installation Outline

Modules in Use

"PS Human Resources (Administer Workforce) (HR), excluding: Position Control and Workflow"

Q52a: If Workflow is not in use by King County, then please explain why the table on page 8 under System Discovery Notes indicates that "Modified PS Workflow Activities" is 1 and "Modified PS Workflow Bus. Processes" is 1. Why has King County modified PS Workflow if it is a module that is not in use?

A52a: The ePay application uses workflow to send W2 re-issue requests to a payroll administrator worklist. This is the only place workflow is used.

Interfaces

Q52b: The County indicates that the scope of the PeopleSoft Upgrade project includes eleven (11) inbound and thirty-three (33) outbound interfaces. Is the County willing to provide more details on these interfaces to Proposers prior to the proposal due date of August 4, 2005?

A52b: Please see response to Q92 in this addendum.

Q52c: Is there a list of the interfaces (inbound and outbound) and their function available?

A52c: Please see response to Q92 in this addendum.

Q52d: What are the type of programs for interfaces and the complexity of these programs. What kind of interfaces they are: SQR, Application Engine, Component Interfaces, etc?

A52d: Please see response to Q92 in this addendum.

Questions regarding King County Sub Systems Developed using PeopleTools

Q52e: Can more details be made available on the Sub Systems the County has developed in terms of size? (particularly the WA State Retirement Reporting sub system and MSA Payroll printing?)

A52e: Please see response to Q29f in this addendum.

Q52f: Please provide clarification on the functions of MSA Payroll Printing. What does it involve – printing of checks, provide employee self-service, etc.?

A52f: Please see response to Q29f in this addendum.

Question regarding PS Updates/Fixes - "Up-to-date as of March 1, 2005, incorporating all of the pertinent updates and fixes to version 8.0 SP1.

Q52g: Is King County planning to have all pertinent patches/updates and fixes applied to the current installation so as to be up-to-date as of the proposed start of the upgrade project in November 2005?

A52g: Yes.

Question regarding Web Reporting

Q52f: "Additional database objects built for separate web reporting DB user." Is King County Web Reporting using PeopleSoft Queries or SQR or something else? Please elaborate on the mechanisms for Web Reporting.

A52h: A web reporting schema has been created in the database and SQL statements are used to extract pertinent data. The consultant is expected to provide the expertise in identifying objects that need to change..

Question regarding Customizations

Q52i: The table on page 8 under System Discovery Notes does not reflect any modifications to Cobol programs. Has King County made any customizations/changes to the HRMS Cobol programs? If so, PL's has been customized.

A52i: Please see response to Q5 in this addendum.

Q53: Regarding Page 12, Section 2.1 Project Team
"…the County will also provide its own staff resources as primary participants throughout all phases of the project. County staff has significant functional and technical experience with PeopleSoft."

Q53a: What is the expertise (system administration or application development) of the King County technical resources assigned to the PeopleSoft upgrade project, specifically the King County Technical Lead?

A53a: The technical lead has extensive application development experience.

Q54: Regarding Page 13, Section 2.2 Scope of Work

"The County is in the early stages of a large scale business process transformation program called Accountable Business Transformation (ABT)."

Per the County's OIRM web site,

"Description of Project:

This project will satisfy a Washington State mandate (Chapter 41.37 RCW) to implement a new Department of Retirement Systems (DRS) retirement plan: Public Safety Employee Retirement System 2 (PSERS 2). The project will involve a technical and business component.

The technical component will:

Develop new configurations in the county's two payroll systems, MSA/PeopleSoft and retrofit the King County Retirement Reporting System with the reporting requirements of the new plan. The project will include modifications to existing code in the three above-mentioned systems including downloads into the reporting system, and all testing up to and including acceptance testing with DRS."

Q54a: Has the DES: Finance - PSERS Implementation, project #377162, started and is it still targeted to go live with the upgrade in September 2006?

A54a: This will be clarified during the Discovery days.

Q54b: Part of project#377162 is to "*Develop new configurations in the county's two payroll systems, MSA/PeopleSoft and retrofit the King County Retirement Reporting System with the reporting requirements of the new plan.*" What is King County's current understanding of the relationship (timing, cooperation, governance) between these two projects?

A54b: This will be clarified during the Discovery days.

Q55:   Regarding Page 14, Section 2.2, Item # 3 New Features in existing modules - Is there a list available of the current business and technical issues the County is currently facing and expects to be potentially addressed by "new features"?

A55:   This will be clarified during the Discovery days.

Q56:   Regarding Page 14, Section 2.2, Item # 7 Reports Environment - The County mentions that it "expects to do the technical work related to the Web reports" but doesn't specify whether that includes the PS queries. Will the County do the technical work related to updating report queries?

A56:   County staff will assist the Consultant in updating report queries. The technical work for web reports is separate from queries and County staff will perform these tasks.

Q57:   Regarding Section 3.2 Schedule

- Page 6 – The County mentions that they are planning to start the roll out of the upgraded PS and Oracle Fin in 2007.

- Page 13 – part of the scope of work is to "prepare the County's PS environment and staff to support the roll out to the entire County."

- Page 17 – The County states that the kickoff of the upgrade project is 11/01/05 and the estimated implementation roll out is 9/2006.

Q57a: When does King County expect/require the upgrade to be finished by 9/2006?

A57a: Please see schedule on page #17 of the RFP. This will be clarified during the Discovery days.

Q57b: How long does King County expect the upgrade to take?

A57b: Please see schedule on page #17 of the RFP. This will be clarified during the Discovery days.

Q56c: Is it King County's expectation to start the roll out before the upgrade is complete and then upgrade the other sites? Or since this implies the implementation roll out is 1 year into the project are they expecting this to incorporate the roll out too as they stated they that the expected contact period will be for two years (page 3)?

A57c: the County desires to upgrade before any rollout.

Q58:   Please highlight the number of Application Servers/Web servers/Process Schedulers created for load balancing of the current PS 8SP1 production.

A58:   Please see Section II 1.3 – The PeopleSoft Hardware and Software Environment.

Q59:   Is the Fit/Gap analysis to be included in the effort estimate for this upgrade project.

A59:   Yes.

Q60:   What was your previous UAT timeline during the upgrade from 7.0 to 8SP1.

A60:   This will be clarified during the Discovery days.

Q61:   Does the client have the required documentation on the previous Technical upgrade and customization?

A61:   *Yes.*

Q62:   Please let us know the size of your current production in GB? If possible please mention only the used space.

A62:   *204 GB.*

Q63:   Please clarify whether client is expecting a dedicated resources for Architecture & Infrastructure through out the project or only during the study phase for recommendations on Hardware and Software decisions.

A63:   *Only during the study phase for recommendations.*

Q64:   Please provide the suitable model for this project.

        Onsite only 2) Onsite/Offshore

A64:   *Onsite.*

Q65:   Is there a possibility of getting the compare reports or documents on the customizations to identify the impact on the customization prior to the proposal submission? This is to break down the customization further into simple/medium/complex for the effort estimate.

A65:   This will be clarified during the Discovery days.

Q66:   What is the desired upgrade cutover for Go-Live?

A66:   *September, 2006.*

Q67:   Does client has an archival plan before the upgrade begins?

A67:   *No.*

Q68:   Please mention the biggest tables with row counts (only PS tables) in upgrade NAQ.

A68:   This will be clarified during the Discovery days.

Q69:   What format should the consultant use to transmit their response on CD?

A69:   *The County expects the proposals to be made with the appropriate Microsoft Office Suite applications and Microsoft Project version 2003. The County will also accept pdf format.*

Q70:   What is the size of the compressed Oracle dumpfile?

A70:   *15 GB*

Q71:   What is the actual size of the database?

A71:   *204 GB*

Q72:   Will there be any work done with Web Reporting Tools?

A72:   *The consultant will be responsible for reviewing King County developed database objects implemented for custom Web enabled reporting, and identify necessary schema and other object changes to convert to PeopleSoft HRMS version 8.9 and assist King County developers to implement the changes.*

Q73:   Will there be a mirror or data warehouse?

A73:   *No.*

Q74:   Is there an expectation for the consultant to change schema?

A74:   *Answered in #72.*

Q75:   Is there an expectation for the consultant to use newest version of PeopleTools and related utilities or just provide a recommendation?

A75:   *Yes, we expect the consultant to use the latest tools supported by the PeopleSoft 8.9 environment.*

Q76:   Are additional details and complexities of interfaces available?

A76:   *More detail will be available for the selected finalists during Discovery Days.*

Q77:   Are existing queries just to be upgraded or is the County expecting the Consultant to perform analysis of the queries, make recommendations, and implement the recommended changes?

A77:   *The County expects the Consultant to perform an analysis of the existing queries, make recommendations and implement the recommended changes in partnership with County staff.*

Q78:   Is it anticipated that the County will contract with an outside firm for QA on this project?

A78:   *Yes. The County is expecting to engage a QA firm to review the progress of the PeopleSoft upgrade.*

Q79:   Is configuring security part of this contract?

A79:   *Yes.*

Q80:   Is the County considering licensing UPK for this effort?

A80:   *Not for this upgrade project.*

Q81:   Is there an approved budget for this effort?

A81:   *Yes.*

Q82:   Is a "compare report" to be provided?

A82:   *The County may provide a compare report to the finalists during Discovery Days.*

Q83:   Does the County plan to implement eBenefits v8.0 prior to the start of the 8.9 upgrade or is this task part of the upgrade project?

A83:   *No. This task is not part of the upgrade.*

Q84:   Will the County contract with PeopleSoft for the installation and certification of 8.9 or will this be a task for the consultant?

A84:   *For the purpose of this proposal, please consider the installation and certification of 8.9 within scope for the consultant.*

Q85:   What is the current version of Oracle being used by the County?

A85:   *Version 8.1.7*

Q86:   Regarding 3.1 Evaluation Criteria: Is there a list of SEDB Certified vendors that can be reviewed?

A86:   *Yes. You will find it on at: http://www.metrokc.gov/exec/bred/bdcc/prog/CertSEDBDirectory.xls. Vendors must be registered prior to the bid opening and indicate their Certification number on the returned signed addendum to be eligible for the 10 points during evaluation. Partnerships with other firms to meet SEDB goals is explained in the attachment.*

Q87:   Regarding 3.1 Evaluation Criteria: Is there any special consideration given to minorities?

A87:   *No. In Washington State, Initiative-200 eliminated this requirement.*

Q88:   Regarding 4.1 Mandatory Experience: Will the County consider rewriting Mandatory Experience Requirement by not limiting the project experience to specific version to version upgrades, but perhaps requiring specific applicable version experience (HCM 8.8/8.9) or upgrade experience (any upgrade to an HCM 8.x release)?

A88:   *Please see changes to the RFP under Item X of this addendum.*

Q89:   Regarding 1.2 King County Installation Outline: Will the infrastructure evaluation be completed prior to the beginning of the upgrade efforts? What are the expectations of the consultant relating to the technical infrastructure? (Installation)

A89:   *Yes, the infrastructure analysis will happen before the upgrade efforts. We want the consultant to review and comment and accept the infrastructure assessments.*

Q90:   Regarding 2.1 Project Team: What are the Roles and Responsibilities for each of the Payroll Systems Support and Development team?

A90:   *Please see Section 2.1 of the RFP.*

Q91:   Regarding 2.2 (Scope of Work) - Overview: Are you asking the vendor to identify a breakdown of task responsibilities between the Consultant and the County or are you expecting an estimate of the number of hours the County staff will need to devote to specific tasks?

A91:   *The County is requesting the consultant provide a breakdown of the major tasks by County and consultant; and the estimated hours for each.*

Q92:   Regarding 2.2 (Scope of Work) – Overview: *Prepare the County's PeopleSoft environment and staff to support the roll out to the entire County:* Are interfaces included?

A92:   *Yes. Here is a list of the interfaces:*

Process Name	Direction	Tools	Description
Transit CompTime Balance	Outbound	SQR	Creates a text file of comp time data for the Transit Time System.
IBIS GL C.O.A. Validation	Inbound	SQR	Loads new project, fund and grant data from Oracle Financials
IBIS Department ReOrg	Inbound	SQR	Builds an updated department tree and modifies employee departments during mass reorganizations.
IBIS Month End	Outbound	SQR	Provides both detail and summary financial data based on calendar month to Oracle Financials.
Census Codes from Affirm Action	Inbound	SQR	Updates employee job rows with specific affirmative action codes
Ethnic/Veteran Employee Data	Inbound	SQR	Loads employee data regarding ethnicity and veteran status that is received via surveys.
New Hire Report	Outbound	SQR	Text file for transmitting employee data to the state child support enforcement agency.
PERS	Outbound	SQR	Creates a text file for sending retirement withholding data to the state retirement system.
Benefit Carrier Files	Outbound	SQR	Provides employee and dependent information to healthcare providers for those that are eligible.
Deferred Compensation	Outbound	SQR	Builds a text file to transmit to 3rd party retirement plan company with current withholding.

City Retirement	Outbound	SQR	Text file that transmits current retirement withholdings for a small number of employees using city retirement system.
Cobra Retiree	Outbound	SQR	Provides data on employees and dependents recently losing coverage to 3rd party cobra administator.
DCAP	Outbound	SQR	Provides DCAP and FSA withholdings to the 3rd party administrator.
Benefit Confirmation Letters	Outbound	SQR	Creates a word document for mailing to employees to confirm their benefits changes.
Benefit Enrollment Forms	Outbound	SQR	Creates text files of employee data suitable for merging to create annual enrollment forms.
Timesheet Files (Feeders)	Inbound	SQR	Receives text files of employee time and labor data.
Time Sheets	Outbound	SQR	Creates a PDF file suitable for printing and signing.
Comp Time Liability	Outbound	SQR	Provides comp time liability reports by cost center.
Batch Charitable Campaign	Inbound	SQR	Loads a file from the United Way of what each employee has agreed to donate.
Batch Deduction Loads	Inbound	AppEngine	Loads a file of current employee deductions.
Batch Earning Loads	Inbound	SQR	Uploads employee earning data usually for retro payments.
Transit TOPS Shakeup File	Inbound	SQR	Loads a text file of new cost centers and updates job rows accordingly.
Charitable Campaign Report	Outbound	SQR	Reports charitable donations for validating United Way accounts
Direct Deposit	Outbound	SQR	Text file of current payroll data for transmitting to bank.
Warrant Recon	Outbound	SQR	Text file sent to a mainframe system detailing each check created via PeopleSoft.
State Suppl Pension Fund	Outbound	SQR	Report detailing employee SSPF withholdings
Part & Full Vacation Balances	Outbound	SQR	Provides a text file of vacation balances to load into the Transit time system.
Unemployment Compensation	Outbound	SQR	Creates a text file for transmitting to the state detailing current earnings eligible for unemployment compensation.

Saving Bonds	Outbound	SQR	File created for the federal government detailing saving bond purchases
Local 587 Dues	Outbound	SQR	Text file supplied to the union that includes union due withholding amounts.
Metro Credit Union	Outbound	SQR	Text file of deposit information for transimitting to the employee credit union.
CAAMS	Outbound	SQR	Builds data files with affirmative action related data for an external application to load.
Transit Security Views	Outbound	Database	Secure views that the Transit database extracts regularly.
HRD Security Views	Outbound	Database	Secure views that the HRD database extracts regularly.
Budget Employee Id Mapping	Outbound	SQR	Creates a text file of employee id based data that the budget office uses for mapping purposes.
MSA Employee Load	Inbound	AppEngine	Updates PS with MSA paid employee information (currently tracks 28 values)
MSA Payroll	Inbound	SQR	Loads the semi-monthly payroll data into custom tables for the purposes of printing.
3rd Party Training	Both	AppEngine	Creates and Loads training data for third party vendors providing online training.
ECHO Outbound	Outbound	SQR	Creates a text file of pay earnings to transmit to a 3rd party data archive company.
Budget Interfaces to IBIS	Outbound	SQR	Provides a text file of current employee data for the budget office to load.

Q93: On Page 7 of the RFP, a breakdown of customizations by complexity is noted; the majority of these customizations are defined as 'Small'. Are there specific business processes in each of these modules that required the most customization? Which processes within each product (HR, Benefits, Payroll and Time & Labor) required the majority of the customizations?

A93: Each customization can include multiple application designer objects. For example, one new requirement might involve creating a record, 5 fields, a page and a component. So this one customization appears as 8 application designer objects added.

Q94: On Page 7 under the 'Summary by Module by Size' table shows a total of 215 customizations; yet, on Page 8 under 'System Discovery Notes', there are significantly larger numbers of customizations and modification numbers listed under Records, Panels, PeopleCode, SQRs, App Engines, Queries, and Workflows. Why is there a discrepancy here?

A94: Each customization can include multiple application designer objects. For example, one new requirement might involve creating a record, 5 fields, a page and a component. So this one customization appears as 8 application designer objects added.

Q95:   On Page 8 under 'System Discovery Notes', 2345 custom added queries are noted; are these distinct, unique PUBLIC queries or does this comprise of numerous ad-hoc and private queries and possible duplications that were built on the fly?

A95:   There are numerous ad-hoc and private queries that may be duplicates, and some that may no longer be needed or used.

Q96:   On Page 13 under the topic of 'Extended Team', it is stated that "The County plans on obtaining additional functional support... from County departments for all modules as needed". What is the nature of this additional support? Are these resources current users/owners of the system?

A96:   This will be clarified during the Discovery days.

Q97:   Also on Page 13, "Improve current configurations and set ups within the PeopleSoft system to solve business, technical and performance problems." What is the cause and effect of these configuration problems at this time?

A97:   There is not a firm list of current problems or improvements required. This is more of a general request that the current configuration and setup be reviewed to see if there could be improvements. These may involve improving performance, security, enabling unused features or other areas.

Q98:   Just to clarify, on Page 14 under 'New Features in existing modules' - is King County looking only to avail of newer features and functionality to address existing business processes in their current product or are there new product features that are desired?

A98:   This will be clarified during the Discovery days.

Q99:   Page 14, Section 4 – Configuration and Set up Review and Recommendations

    Q98a: Are recent business process maps available for the current departments currently on PeopleSoft 8.0?

    Q99a: No.

    Q99b: Are recent business process maps available for future departments scheduled to be brought on PeopleSoft over the next few years?

    Q99b: No.

    Q99c: How well are current customizations documented? Completely? Varying Degrees of Completeness and Accuracy? Not well?

    A99c: The system has been through several implementation phases. Some customizations are very well documented and neatly organized. Others are briefly documented and may require looking at the code comments and changes involved. And some may have very little specification available

    Q99d: Do documented customizations include functional specifications that define the justification for the customization?

    A99d: Documented customizations do include functional specifications some of which may detail the justification for the change.

    Q98e: Which areas of functionality are causing the most challenges in performance in today's environment?

    A98e: There are some HR components that have performance issues for online users. Also, Time and Labor is growing in usage and occasionally has performance issues.

Q100:   Page 14, Section 5 – Spécifications

    Q100a: How detailed are the technical specifications?

A100a: Many customizations are small enough that they may not have a thorough technical design document associated with them. King County code changes, whether SQR, PeopleCode or Application Designer objects are easily identifiable and are well documented within the system

Q100b: Can you provide a sample of what is available or a list of the data collected for each specification?

*A100b: See attachment RFP 137-05RLD Addendum **Exhibits #4** and **#5** (Included as an attachment to e-mailed versions of this addendum, and available via hyperlink on the web-posted version).*

Q101:   Page 14, Section 7 – Reports Environment - Are current reports catalogued and well documented?

A101:   King County is using many of the delivered reports and has added a good number of new and customized reports. An up-to-date catalog of reports currently used is not available. However, many are described in end-user training documentation or in functional specifications.

Q102:   General Question - What is the normal process today for multiple County departments to reach consensus on decisions that affect the entire County?

A102:   A governance structure is in place for ABT and all the projects that are in it.